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World Production and Trade

United States
Department of
Agriculture

Foreign
Agricultural
Service

Washington, D.C. 20250

Weekly
Roundup

WR 23-84

June 6, 1984

The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade:

GRAIN AND FEED

The THAI Board of Trade will reportedly send a trade team to Japan in an effort to revive their corn trade agreement and request that Japan purchase 300,000 tons of Thai corn. Reports of a Thai corn harvest as large as 5 million tons, 25 percent more than last year's near-record crop, could mean sharply higher exports in competition with U.S. corn in far eastern markets. Thailand has not sold large quantities of corn to Japan since 1981/82 when 200,000 tons were shipped; during the late 1970s, Thailand annually sold 300,000-700,000 tons of corn to Japan.

Deteriorating crop prospects in MOROCCO could necessitate large wheat and barley imports in 1984/85. The United States has provided 50-70 percent of Morocco's total 1.3-2.2 million tons of wheat import needs the past few years, with the balance coming from the European Community (EC). However, a recent Moroccan trade mission to Argentina reportedly discussed the purchase of Argentine wheat. Morocco still has U.S. blended credits available to purchase about 600,000 tons of wheat during the balance of fiscal 1984. Morocco has not imported barley for several years. However, the third poor harvest in the past four years could require a record 300,000 tons of imports for emergency use in drought-distressed areas.

Grain production in YUGOSLAVIA for 1984/85 is estimated at 16.9 million tons, down 2 percent from last year's harvest, according to the U.S. agricultural counselor in Belgrade. Wheat production area dropped 10 percent from last year due in part to unfavorable planting conditions last fall and unfavorable wheat prices relative to corn. Wheat production in 1984/85 is estimated at 4.8 million tons, a 13-percent decline from the 1983/84 harvest. Total coarse grain production is estimated at 12.1 million tons, 3 percent above last year's harvest. The projected increase in coarse grain production for 1984/85 is due mainly to an expected 5-percent increase in the area planted to corn. Corn production for 1984/85 is estimated at 11.0 million tons, 3 percent above last year's crop. Production of other coarse grains, including barley, rye, oats and mixed grain, is estimated at 1.1 million tons, slightly above last year's harvest.

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AUG 7 1984

WEST GERMAN grain production for 1984/85 is expected to rise 2 percent to 23.6 million tons, according to the U.S. agricultural counselor in Bonn. Generally, crop conditions have been favorable throughout the country with only the northern areas facing dry conditions. Wheat production is estimated at 8.9 million tons, slightly below last year's crop, while coarse grain production is projected to reach 14.7 million, a 5-percent increase over 1983/84. Corn production is expected to total 1.1 million tons, an increase of 18 percent from the drought-affected 1983/84 crop, while barley production is estimated at 9.2 million tons, 3 percent above last year. Other coarse grains, including rye and oats, are estimated at 4.4 million tons, an increase of 6 percent from 1983/84.

OILSEEDS AND PRODUCTS

With the EUROPEAN COMMUNITY seeking crops to substitute for its surplus cereals, several oilseeds are attracting increasing attention. EC price supports enhance the attractiveness of these crops to producers.

Rapeseed has been an important crop in Europe for a number of years, and rapeseed oil is already in surplus. Expanded use of low erucic acid ("double zero") rapeseed varieties, however, makes rapeseed meal more readily usable by animal feed compounders. Field peas and lupins, which are nitrogen fixing legumes, work well in crop rotations and do not add to the stock of vegetable oils that have difficulty competing with imported edible vegetable oils.

These crops could help fill the EC's vegetable protein deficit. As such, they pose a potentially serious threat to U.S. exports of soybeans and products to the EC.

The National Grain Board of ARGENTINA recently instituted a series of suspensions on export registrations for oilseeds and products. These measures were designed to moderate domestic vegetable oil price increases.

Export registrations were first suspended on all oilseeds and vegetable oils from May 11-14 to allow the Board to implement a system of setting minimum daily export prices. All registrations, except for sunflowerseed and oil, were reopened on May 15. Subsequently, the export duty on sunflowerseed was raised from 25 to 33 percent and the duty on crude and refined sunflowerseed oil was increased to 22 percent from 14 percent. On May 23, soybean oil export registrations were again suspended, reportedly to allow the Grain Board to adjust export duties. However, on May 30 export registration were again permitted on sunflowerseed oil.

These activities, along with similar measures by BRAZIL, have added to the volatility of world oilseed and product markets at a time when prices of vegetable oils have been increasing sharply to ration the reduced 1983/84 supply.

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FISHMEAL EXPORTERS ORGANIZATION (FEO) COUNTRIES' cumulative output and trade of fishmeal continued to lag in the first three months of 1984. The data below show production and exports for January-March 1984 down by 8 percent and 30 percent, respectively. However, ending stocks of fishmeal in the FEO countries on March 31 were 11 percent above the same date a year earlier. Data are as follows in 1,000 tons:

Country	-----Jan-Mar 1983-----			-----Jan-Mar 1984-----		
	Production	Exports	Ending Stocks	Production	Exports	Ending Stocks
Chile	140	94	188	136	56	197
Iceland	11	10	5	72	43	47
Norway	107	59	85	34	27	63
Peru	95	104	47	81	61	54
Total	353	267	325	323	187	361

During March alone, combined fishmeal output increased by 8 percent, although exports declined 5 percent from March 1983. In mid-May, fishmeal prices, basis Europe, dipped to \$373 per ton, 15 percent below the same month last year. Despite reduced fishmeal output the fishmeal/ soybean meal price ratio declined to 1.66 compared to 1.89 a year ago.

DAIRY, LIVESTOCK AND POULTRY

In the EUROPEAN COMMUNITY, EC intervention stocks of butter and nonfat dry milk (NFDM) continue at high levels. Butter stocks as of April 26 were 943,435 tons, up nearly 100,000 tons from January. Although still very high, NFDM stocks have been declining steadily since the beginning of the year and were 900,701 tons on April 26, down from 987,238 tons in January.

By comparison, CCC butter stocks on April 27, were 165,477 tons, down 2,263 tons from January 27. NFDM stocks held by CCC on April 27 were 611,228 tons, down 28,700 tons from January. EC dairy stocks have little impact on U.S. trade due to the small volume of commercial U.S. dairy product exports.

Effective May 21, the EUROPEAN COMMUNITY COMMISSION lowered its subsidies for exports of canned hams and shoulders to the United States for the second time in less than a month. The new subsidy for canned ham is \$446 per ton, compared with the previous subsidy of \$493. For canned shoulders, the new level is \$365 per ton, down from \$411. The Commission said that these changes were being made in anticipation of rising U.S. prices in 1984. However, EC budgetary problems undoubtedly also played a significant role in the decision.

The EC exported \$236 million of canned hams and shoulders to the United States in 1983, up 14 percent from 1982. Denmark and the Netherlands were the primary exporters, accounting for 80 percent and 15 percent, respectively, of U.S. imports from the EC. These reductions could save the Commission up to \$5.5 million over a 12-month period, if U.S. prices increase and the EC is able to maintain its current level of exports to the United States.

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COTTON AND FIBERS

In the UNITED STATES, cotton exports dipped seasonally in April, but continued to set a rapid pace. April exports totaled 763,000 bales, 19 percent less than March, but still the second highest April level since 1927. August-April exports reached 5.3 million bales, 98,000 above total 1982/83 shipments.

FRUITS AND NUTS

Citrus production in SELECTED COUNTRIES of the Southern Hemisphere for the 1984 season, is forecast at 13.25 million tons, up nearly 3 percent from last year's 12.92-million-ton harvest. Production estimates, with 1983 production in parentheses, are as follows in 1,000 tons: sweet oranges 11,325 (10,878); tangerines 836 (878); lemons 497 (559); grapefruit 270 (278); and other citrus (including sour oranges, limes, and miscellaneous citrus varieties) 320 (326).

Brazil's 1984 citrus crop, with the bulk of the harvest just getting underway, is expected to be up 4 percent from last season's harvest but about 4 percent below the record crop harvested in 1982. The orange crop is forecast at 9.7 million tons, 5 percent above last season. The orange crop in the commercial citrus zone of the state of Sao Paulo, which dominates Brazilian orange production, is expected to total about 7.8 million tons, up 6 percent from last year's rain-reduced harvest. Brazilian tangerine production is forecast at 530,000 tons, down 7 percent.

Reacting to sharp price increases, spurred by the freeze-reduced U.S. citrus crop, orange producers in Sao Paulo accelerated grove improvement efforts. It is expected that the improvements and more timely and less selective pickings will account for most of the increase forecast for the Sao Paulo crop.

In Argentina, the 1984 citrus crop is forecast down 9 percent from last year. The orange crop is forecast at 580,000 tons, also down 9 percent. Frosts at flowering contributed to the reduction. The 1984 lemon crop is expected to total 320,000 tons, 16 percent below last year's output. Unfavorable grower prices and reduced input usage accounted for the decline. The tangerine and grapefruit harvests are expected to be slightly below 1983 levels.

In Chile, 1984 citrus production is expected to be down 5 percent from last season. The orange crop is expected to be up 4 percent; lemon production, down 14 percent. Last year's frosts damaged the summer lemon crop (harvested during January and February) and is expected to reduce the size of the winter crop (harvested during July and August). Uruguay's 1984 citrus harvest is expected to be up 8 percent from last season. The orange crop is forecast at 67,000 tons, up 5 percent.

In Australia, this year's citrus crop is forecast up 5 percent from last season. Orange production is forecast at 417,000 tons, up 5 percent. Most of the increase in orange production is due to an expected 35,000-ton increase in the Valencia crop, from larger bearing area and yields. The bulk of the Australian citrus harvest begins in April and runs through the end of the year.

South Africa's 1984 citrus crop is forecast down slightly from last season and at a 7-year low. The drought and high temperatures, which reduced 1983 outturn, also limited irrigation supplies, leading to a reduction in 1984 output. The 1984 orange crop is expected to total 495,000 tons, slightly below last year. About one-half of the South African orange crop is comprised of Valencias with navels accounting for about one-third.

Total citrus production in selected countries of the Southern Hemisphere is estimated, by country, as follows in 1,000 tons:

Country	Revised 1983	Forecast 1984
Brazil	10,133	10,572
Argentina	1,412	1,280
Chile	131	125
Uruguay	130	140
Australia	482	508
South Africa 1/	631	623
Total selected		
Southern Hemisphere	12,919	13,248 2/

1/ Includes production of Mozambique, Swaziland and Zimbabwe marketed through the South African Citrus Board. 2/ Chances are 2 out of 3 that the outcome will be within 500,000 tons of this forecast.

JAPAN'S 1983/84 citrus crop is estimated at 3.6 million tons, down 4 percent from the previous estimate (see WR 48-83) and about equal to last season's harvest. The 1983/84 tangerine harvest is estimated at 3.2 million tons, of which 2.9 million, or about 88 percent, are satsumas (mandarin oranges). The slightly reduced satsuma harvest reflects this season's unusually cold winter and spring temperatures, which delayed flowering; this is also the "off-year" for the alternate bearing satsuma trees.

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COFFEE, TEA AND COCOA

The first WORLD green coffee production forecast for 1984/85 is 92.5 million 60-kilogram bags, up more than 2 percent (2.2 million bags) from the revised estimate of 90.3 million bags for 1983/84. South American production is forecast down 7 percent from last year. Brazil, the world's largest producer, is expected to harvest a 27-million-bag crop, 10 percent less than a year earlier. In the states of Sao Paulo and Minas Gerais, heavy rains immediately after flowering, caused significant losses and irregular growth of coffee cherries. The coffee in this region has matured earlier than normal and is expected to be available for marketing in early June, one month ahead of the beginning of the coffee marketing year. Elsewhere in Brazil, favorable rainfall has improved coffee crop prospects.

In Colombia, production is forecast to be down slightly to 12.8 million bags as a result of coffee rust outbreaks in four states. As of early April, nearly 250,000 trees were affected, resulting in the pruning of over 300,000 trees. The Coffee Growers Federation (CGF) is campaigning to curtail production by pruning 35,000 hectares of high-yielding trees after the fifth harvest. CGF's diversification program also points to lower production in the future. Growers with limited resources are encouraged to switch from coffee production to dairy operations. Citrus, cocoa and honey bee production and processing of natural silk have also been mentioned to achieve diversification.

Coffee production in North and Central America and the Caribbean region for 1984/85 is forecast up 9 percent from the previous year. All major producing countries, except Haiti (down 35,000 bags), are expecting increases. Mexican output is forecast at 4.3 million bags, up slightly from the 1983/84 season. Below normal rainfall during the April flowering season is the principal factor limiting production. Although freezing temperatures in December 1983 damaged trees, yields should not be affected. Production in Guatemala, projected at 2.6 million bags, is 12 percent more than the previous season. Recently, coffee growers began an active planting renewal program. The number of plants per hectare is reportedly being doubled or tripled. With the intensive plantings some producers may be able to substantially increase production per hectare. El Salvador's production, at 2.5 million bags, and Costa Rica's, at 2.3 million bags, are both forecast up by 11 percent, mostly due to favorable weather and improved cultural practices. Coffee rust is not considered likely to significantly affect Costa Rican production in the foreseeable future, as the government is encouraging control measures.

Africa's 1984/85 production is expected to increase about 13 percent from 1983/84. The most noticeable change is the 5-million-bag forecast for the Ivory Coast, 2.0 million more than last season, but below the record high of 6.1 million bags in 1980/81. Early spring rains and ideal conditions during the flowering period have helped the development and formation of beans. Hybrid coffee varieties were planted on 8,072 and 10,000 hectares, respectively, during the past two campaigns. Although the expansion program has stopped, except for one area, a project to increase stand density covering 18,000 hectares of coffee will commence in the upcoming season. Cameroon's production is forecast at 2.0 million bags, 650 thousand more than the drought-reduced crop of the previous year though slightly below the 2.1 million bag record high output of 1982/83.

Asian coffee output is expected to increase by nearly 20 percent. A record high 2.7-million-bag output is forecast for India. A successful blossom and timely showers this spring, coupled with the biennial bearing tendency, contributed to the optimistic outlook. Coffee production in Indonesia is forecast at 5.3 million bags, 503,000 above the 1983/84 level, but 535,000 short of the record set in 1981/82. The increase in production is expected to come mainly from higher yields. Although the effects of the long drought of 1982 are still evident, moisture conditions in the major coffee-producing regions are better than last year.

Coffee production estimates by region are as follows in 1,000 60-kilogram bags:

Region	Revised 1983/84	Forecast 1984/85
North and Central America and the Caribbean	15,344	16,679
South America	47,185	44,035
Africa	18,781	21,230
Asia	7,982	9,515
Oceania	960	1,010
Total	90,252	92,469 1/

1/ Chances are 2 out of 3 that the outcome will be within 10 million bags of this forecast.

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WORLD FOOD PRICES

FAS Survey of Average Retail Food Prices in Selected World
Capitals, May 9, 1984
(in U.S. dollars per kg or units as indicated,
converted at current exchange rates)

Item	Bern	Bonn	Bras- ilia	Buenos Aires	Can- berra	London	Madrid	Mexico City
Steak, sirloin, boneless..	20.46	8.90	2.57	1.65	7.36	11.26	6.46	3.09
Roast, pork, boneless....	10.30	4.31	3.33	2.60	4.75	4.80	4.35	3.90
Broilers, whole.....	2.99	1.69	1.02	1.13	3.25	2.44	2.08	1.87
Eggs, large,dozen.....	2.43	1.11	0.83	0.77	1.66	1.41	1.03	0.64
Butter.....	7.58	3.39	1.85	2.12	3.23	2.72	5.65	2.89
Cheese,Cheddar,Emmenthaler	8.07	5.29	2.61	3.13	4.75	3.53	6.80	9.36
Milk, whole, liter.....	0.69	0.40	0.25	0.24	0.62	0.54	0.37	0.31
Oil, cooking, liter.....	2.45	0.96	1.21	1.53	2.19	1.18	1.05	0.97
Potatoes.....	0.54	0.50	0.42	0.24	0.89	0.63	0.32	0.62
Apples.....	1.14	0.98	1.60	0.51	2.16	1.60	0.42	1.72
Oranges.....	0.98	0.77	0.28	0.39	1.72	0.67	0.52	0.32
Flour.....	0.83	0.53	0.25	0.22	0.82	0.34	0.42	0.12
Rice.....	1.47	1.07	0.44	0.56	0.91	0.91	0.66	0.45
Sugar.....	0.67	0.71	0.33	0.53	0.63	0.73	0.59	0.31
Coffee.....	7.65	7.83	1.92	4.19	13.69	6.46	5.95	2.01
Total.....	68.25	38.45	18.91	19.82	48.62	39.22	36.66	28.59
(Total Nov. 1983).....	71.80	39.22	20.14	21.54	43.28	39.42	36.64	20.26

Bonn: Steak, sirloin, bone-in. For total November 1983 in Mexico City, rice price excluded.

Item	Ottawa	Paris	Pre- toria	Rome	Seoul	Stock- holm	Tokyo	Wash D.C.
Steak, sirloin, boneless.	6.76	7.05	6.98	8.16	10.85	15.14	30.70	7.69
Roast, pork, boneless....	5.51	4.87	5.63	4.95	3.76	15.50	7.63	5.48
Broilers, whole.....	1.68	3.35	1.75	3.03	2.38	4.18	3.52	1.52
Eggs, large, dozen.....	0.76	1.09	0.95	1.21	1.48	1.68	1.06	1.05
Butter.....	4.23	3.65	2.63	3.94	4.98	3.62	6.04	4.74
Cheese,Ched.,Emmenthaler.	6.97	4.18	3.80	5.77	NA	6.57	4.06	6.59
Milk, whole, liter.....	0.82	0.44	0.51	0.57	0.88	0.49	0.76	0.52
Oil, cooking, liter	1.59	1.64	1.25	1.07	1.67	4.68	1.32	2.10
Potatoes.....	0.48	0.40	0.41	0.52	1.07	0.79	1.74	0.56
Apples.....	1.29	0.81	0.64	0.87	1.93	1.59	1.18	1.74
Oranges.....	1.32	0.58	0.54	0.87	1.44	0.92	2.46	0.88
Flour.....	0.93	0.64	0.64	0.37	0.32	0.65	0.78	0.49
Rice.....	1.94	1.30	1.01	1.04	1.09	1.50	1.57	1.06
Sugar.....	0.73	0.65	0.57	0.71	1.04	0.83	1.21	0.99
Coffee.....	7.32	5.38	7.63	6.76	12.66	6.98	14.30	7.45
Total.....	42.33	36.02	34.97	39.86	45.54	2/65.14	78.35	42.86
(Total Nov. 1983).....	38.89	38.60	33.77	33.23	3/45.72	58.25	78.67	40.01

Note: One kilogram = 2.2046 pounds; one liter = 1.0567 quarts.
2/ Cheese price excluded. 3/ Steak price excluded.

Selected International Prices

Item	:	June 5, 1984	:	Change from	:	A year
	:		:	previous week	:	ago
ROTTERDAM PRICES 1/		\$ per MT		\$ per bu.		\$ per MT
Wheat:						
Canadian No. 1 CWRS-13.5%.		201.50		5.48		--
U.S. No. 2 DNS/NS: 14%....		183.00		4.98		-3.50
U.S. No. 2 S.R.W.10/		153.75		4.18		-2.75
U.S. No. 3 H.A.D.....		191.00		5.20		0
Canadian No. 1 A: Durum..10/		201.00		5.47		-1.00
Feed grains:						
U.S. No. 3 Yellow Corn....		159.50		4.05		-2.00
Soybeans and meal:						
U.S. No. 2 Yellow.....		318.00		8.65		-28.90
Brazil 47/48% SoyaPellets		207.00		--		-13.00
U.S. 44% Soybean Meal.....		209.00		--		-14.00
U.S. FARM PRICES 3/						
Wheat.....		134.10		3.65		-.36
Barley.....		100.59		2.19		-1.38
Corn.....		133.07		3.38		-1.97
Sorghum.....		116.18		5.27		+4.63
Broilers 4/.....		1266.98		--		-36.38
EC IMPORT LEVIES						
Wheat 5/.....		86.80		2.36		+11.80
Barley.....		69.25		1.51		+5.10
Corn.....		54.90		1.39		+7.10
Sorghum.....		76.05		1.93		+3.05
Broilers 4/ 6/ 8/.....		170.00		--		+4.00
EC INTERVENTION PRICES 7/						
Common wheat(feed quality)		183.25		4.99		+4.30
Bread wheat (min. quality)7/		199.25		5.42		+4.65
Barley and all						
other feed grains.....		183.25		N.Q.		+4.30
Broilers 4/ 6/.....		1156.00		--		-3.00
EC EXPORT RESTITUTIONS (subsidies)						
Wheat		N.A.		--		--
Barley.....		N.A.		N.A.		N.A.
Broilers 4/ 6/ 8/.....		133.00		--		+3.00

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Hundredweight (CWT). 3/ Twelve-city average, wholesale weighted average. 4/ EC category--70 percent whole chicken. 5/ Reflects lower EC export subsidy--down to 20.000 ECU/100 bag effective 9/14/83 from 22.50 ECU/100 bag set in 2/83. 6/ F.o.b. price for R.T.C. broilers at West German border. 7/ Reference price. 8/Reflects exchange rate change and not level set by EC. 9/ November shipment. 10/ July delivery. N.Q.=Not quoted. N.A.=None authorized. Note: Basis June delivery.

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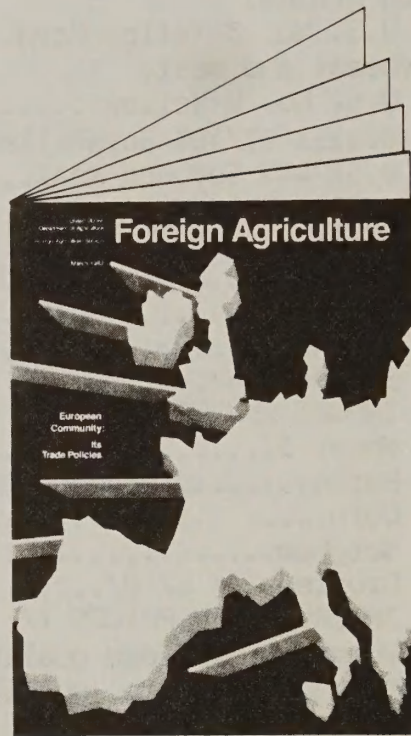
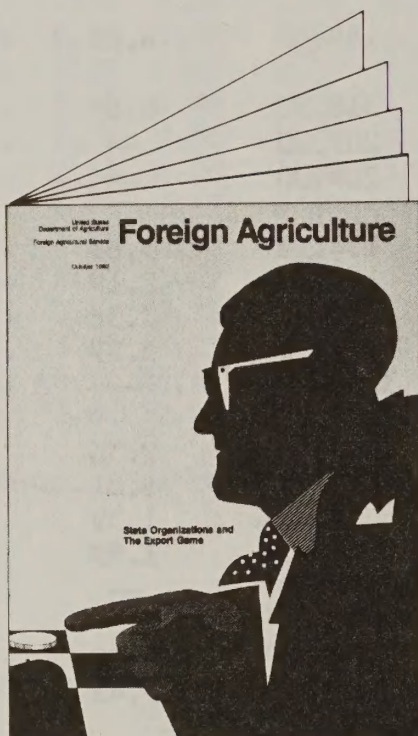
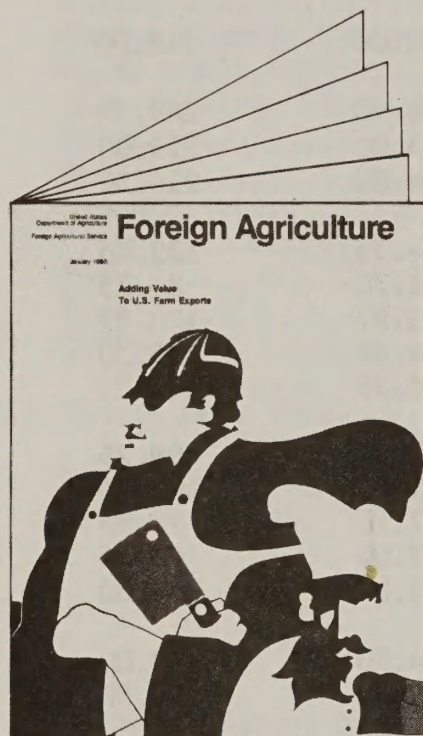
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